

APPENDIX A

DESIGNATED POSITIONS

DISCLOSURE CATEGORIES

BOARD

Deputy to Board Member	All
Administrative Assistant to Board Member	All
Assistant to Board Member	All
CEA	All
Administrative Assistant	1-8
Staff Services Manager	1-8
Tax Counsel	1-6
Tax Consultant Expert	1-6
Program Specialist	1-6
Business Taxes Specialist	1-6
Associate Tax Auditor	1-6
Tax Services Specialist	1-6
Assistant Tax Services Specialist	1-6
Associate Governmental Program Analyst	1-6
Business Taxes Representative	1-6

EXECUTIVE

Executive Director	All
Administrative Assistant	All
Staff Services Manager (Training Unit)	9
Training Officer (Training Unit)	9

BOARD PROCEEDINGS DIVISION

CEA	All
Staff Services Manager	All
Associate Governmental Program Analyst (LAN Workgroup Manager)	1-6,8
Associate Governmental Program Analyst	1-6

CUSTOMER AND TAXPAYER SERVICES DIVISION

CEA	All
Staff Services Manager	1-9
Business Taxes Compliance Supervisor	1-9
Business Taxes Compliance Specialist	1-6
Assistant Tax Services Specialist	1-6
Associate Governmental Program Analyst	1-6
Associate Information Systems Analyst	8
Staff Services Manager (Forms and Publications Section)	7,9
Assistant Tax Services Specialist (Forms and Publications Section)	7,8
Associate Governmental Program Analyst (Forms and Publications Section)	7,8

LEGISLATIVE DIVISION

Assistant Chief Counsel	All
CEA	All
Staff Services Manager	1-6
Senior Specialist Property Appraiser	1-6
Business Taxes Specialist	1-6
Associate Governmental Program Analyst (System or LAN Administrator)	1-6,8
Operations Research Specialist	1-4,6,8
Research Program Specialist	1-4,8
Research Analyst	1-4,8

TECHNOLOGY SERVICES DIVISION

CEA	All
Business Taxes Administrator	1,2,7-9
<u>Business Taxes Compliance Supervisor</u>	<u>1,2,7-9</u>
Data Processing Manager	7-9
Staff Services Manager	7-9
Systems Software Specialist	8
Associate Systems Software Specialist	8
Senior Information Systems Analyst	8
Staff Information Systems Analyst	8
Associate Information Systems Analyst	8
Senior Programmer Analyst	8
Staff Programmer Analyst	8
Associate Programmer Analyst	8
Associate Governmental Program Analyst	8

TAXPAYERS' RIGHTS AND EQUAL EMPLOYMENT OPPORTUNITY DIVISION

CEA	All
Business Taxes Specialist (TRA)	1-4
Associate Property Appraiser (TRA)	1-4
Business Taxes Compliance Supervisor (Offers in Compromise)	1,2
Business Taxes Compliance Specialist (Offers in Compromise)	1,2
Business Taxes Specialist (Offers in Compromise)	1,2
Staff Services Manager (EEOO)	7,9
Associate Governmental Program Analyst (EEOO)	7,9

ADMINISTRATION DEPARTMENT

CEA	All
<u>Operations Research Specialist</u>	<u>1-4,6,8</u>
<u>Research Program Specialist</u>	<u>1-4,8</u>
<u>Research Analyst</u>	<u>1-4,8</u>
<u>Training Officer (Training Office)</u>	<u>9</u>
<u>Associate Governmental Program Analyst (Training Office)</u>	<u>9</u>

ADMINISTRATIVE SUPPORT DIVISION

CEA	All
Staff Services Manager	7-9,11
Associate Business Management Analyst	7-9
Associate Governmental Program Analyst	7-9
Business Services Officer III	7-9
Telecommunications Systems Analyst	11
<u>Office Services Manager (Supervisor, Cashier Unit)</u>	<u>7</u>

PERSONNEL MANAGEMENT DIVISION

CEA	All
Staff Services Manager	7-9
Associate Governmental Program Analyst	7-9
Associate Personnel Analyst	7-9
Labor Relations Specialist	7-9

FINANCIAL MANAGEMENT DIVISION

CEA	All
Staff Services Manager	7-9
Accounting Administrator	7-9
<u>Associate Account Analyst</u>	<u>7-9</u>
Associate Administrative Analyst	7-9
Associate Budget Analyst	7-9

Associate Governmental Program Analyst	7-9	
Staff Information Systems Analyst (Specialist)	8	
POLICY, PLANNING AND EVALUATION DIVISION		
Staff Services Manager III	1-4, 7-9	
Staff Services Manager I or II	7-9	
Associate Management Analyst	7-9	
Associate Business Management Analyst	7-9	
Associate Governmental Program Analyst	7-9	
Associate Information Systems Analyst	8	
Senior Information Systems Analyst	8	
Staff Information Systems Analyst	8	
LEGAL DEPARTMENT		
CEA	All	
LEGAL DIVISION		
Assistant Chief Counsel	All	
Tax Counsel	1-6	
Supervising Tax Auditor	1,2	
Administrative Assistant	7-9	
Librarian	7,8	
Staff Information Systems Analyst	8	
Associate Information Systems Analyst	8	
Business Taxes Specialist II or III	1,2	
Business Taxes Specialist I	1,2 *	
INTERNAL SECURITY AND AUDIT DIVISION		
CEA	All	
Business Taxes Administrator	All	
Business Taxes Specialist	All	
Associate Tax Auditor	All	
Associate Governmental Program Analyst	7-9	
Systems Software Specialist	8	
Staff Information Systems Analyst	8	
Associate Information Systems Analyst	8	
Assistant Information Systems Analyst	8	
INVESTIGATIONS DIVISION		
CEA	All	
Business Taxes Administrator	1,2,7-9	
Business Taxes Specialist	1,2	
Business Taxes Compliance Specialist	1,2	
Supervising Tax Auditor	1,2,9	
Associate Tax Auditor	1,2	
Staff Information Systems Analyst	8	
Associate Information System Analyst	8	
PROPERTY AND SPECIAL TAXES DEPARTMENT		
CEA	All	
Administrative Assistant	1,2,6-9	
POLICY, PLANNING, ASSESSMENT POLICY AND STANDARDS DIVISION		
CEA	All	
Principal Property Appraiser	3,7-9	
Senior Specialist Property Appraiser	3	
Senior Specialist Property Auditor Appraiser	3	
Supervising Property Appraiser	3,7-9	

Associate Property Auditor Appraiser	3
Research Manager (GIS)	3
Research Analyst II (GIS)	3
Associate Governmental Program Analyst	3,7-9
Staff Information Systems Analyst	8
Associate Information Systems Analyst	8

COUNTY PROPERTY TAX DIVISION

CEA	All
Principal Property Appraiser	3,4,7-9
Research Analyst	3
Air Resources Engineer	3
Senior Petroleum and Mining Appraisal Engineer	3
Supervising Property Appraiser (Assessment Practices Surveys Section)	3,7-9
9	
Senior Specialist Property Appraiser (Assessment Practices Surveys Section)	3
Senior Specialist Property Auditor Appraiser (Assessment Practices Surveys Section)	3
Associate Property Appraiser (Assessment Practices Surveys Section)	3
Associate Property Auditor Appraiser (Assessment Practices Surveys Section)	3
Supervising Property Appraiser (Timber Tax Section)	4,7-9
Senior Specialist Property Auditor Appraiser (Timber Tax Section)	4
Associate Property Auditor Appraiser (Timber Tax Section)	4
Senior Forest Property Appraiser	4
Associate Forest Property Appraiser	4

VALUATION DIVISION

CEA	All
Principal Property Appraiser	3,7-9
Senior Specialist Property Appraiser	3
Senior Specialist Property Auditor Appraiser	3
Supervising Property Appraiser	3, 7-9
Associate Property Appraiser	3
Associate Property Auditor Appraiser	3

~~ENVIRONMENTAL FEES DIVISION~~

CEA	All
Business Taxes Compliance Supervisor	1,2,9
Business Taxes Compliance Specialist	1,2,9
Supervising Tax Auditor	1,2,9
Business Taxes Specialist II or III	1,2,9
Business Taxes Specialist I	1,2 *
Associate Tax Auditor	1,2 *

EXCISE TAXES AND FEES DIVISION

CEA	All
Business Taxes Compliance Supervisor	1,2,6,9
Business Taxes Compliance Specialist	1,2,6,9
Supervising Tax Auditor	1,2,6,9
Business Taxes Specialist II or III	1,2,6,9
Business Taxes Specialist I	1,2,6 *
Associate Tax Auditor	1,2,6 *

FUEL TAXES DIVISION

CEA	All
Business Taxes Administrator	1,2,7-9
Staff Services Manager	1,2,9
Business Taxes Compliance Supervisor	1,2,9

Business Taxes Compliance Specialist
Supervising Tax Auditor

1,2,9
1,2,9

Business Taxes Specialist II or III	1,2,9
Business Taxes Specialist I	1,2 *
Associate Tax Auditor	1,2 *

SALES AND USE TAX DEPARTMENT

CEA	All
Business Taxes Administrator	1,2,7-9
Administrative Assistant	1,2,7,8
Business Taxes Compliance Supervisor (LAN Administrator)	1,2,8,9
Business Taxes Compliance Supervisor	1,2,9
Business Taxes Compliance Specialist	1,2,9
Supervising Tax Auditor	1,2,7-9
Business Taxes Specialist II or III	1,2,7-9
Business Taxes Specialist (Special Projects)	1,2,7-9
Business Taxes Specialist (Systems Coordinator)	1,2,8,9
Business Taxes Specialist (Training Group)	1,2,9
Business Taxes Specialist (Computer Audit Specialist)	1,2,8
Business Taxes Specialist (Regulation Coordinator)	1,2
Business Taxes Specialist (Revenue Opportunity)	1,2
Business Taxes Specialist (Technical Advisor)	1,2
Business Taxes Specialist (Project Coordinator)	1,2
Business Taxes Specialist I	1,2 *
Associate Tax Auditor	1,2 *
Staff Information Systems Analyst	1,2,8
Associate Information Systems Analyst	1,2,8
Associate Governmental Program Analyst	1,2
Office Services Manager (Supervisor, Cashier Unit)	7

CONSULTANT

All **

* Pursuant to 2 California Code of Regulations, section 18733, in lieu of filing ~~Statements of Economic Interests (Form 700)~~ Form 700, an employee in this disclosure category who was not assigned and did not participate in any property tax audits shall file Form 700-A. who during the course of the reporting period has not participated in an assignment in which he or she has an economic interest may sign a statement to that effect under penalty of perjury, on a form provided by the Board Equalization or the applicable form developed by the Fair Political Practices Commission. The statement shall be filed and processed in the same manner as the Form 700. An employee who participated in an assignment in which he or she had an economic interest shall use the appropriate schedules of Form 700 to disclose that interest.

** Consultants shall be included in the list of designated employees and shall disclose pursuant to the broadest disclosure category in the code subject to the following limitation:

The Executive Director may determine in writing that a particular consultant is hired to perform a range of duties that is limited in scope and thus is not required to fully comply with the disclosure requirements in this section. Such written determination shall include a description of the consultant's duties and, based upon that description, a statement of the extent of disclosure requirements. The Executive Director's determination is a public record and shall be retained for public inspection in the same manner and location as this conflict of interest code.